

Survey of California Voters

Presentation of Survey Results



EMC Research, Inc.

436 14th Street, Suite 820

Oakland, CA 94612

(510) 844-0680

EMC #09-4198

Prepared for:

AB 32 Implementation Group

January 2009

Methodology

- Telephone survey conducted December 7-14
- N = 1000
- Random sample of registered voters in California
- Overall margin of error $\pm 3.1\%$
- Split samples used to test wording differences
 - Sample A: n=500; MoE= $\pm 4.4\%$
 - Sample B: n=500; MoE= $\pm 4.4\%$
 - Sample C: n=500; MoE= $\pm 4.4\%$
 - Sample D: n=500; MoE= $\pm 4.4\%$
- When applicable, results tracked with August 2008 survey: N=1,000; MoE +3.1% (EMC #08-3950)

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

Please note that due to rounding, percentages may not add up to exactly 100%

Issue Environment

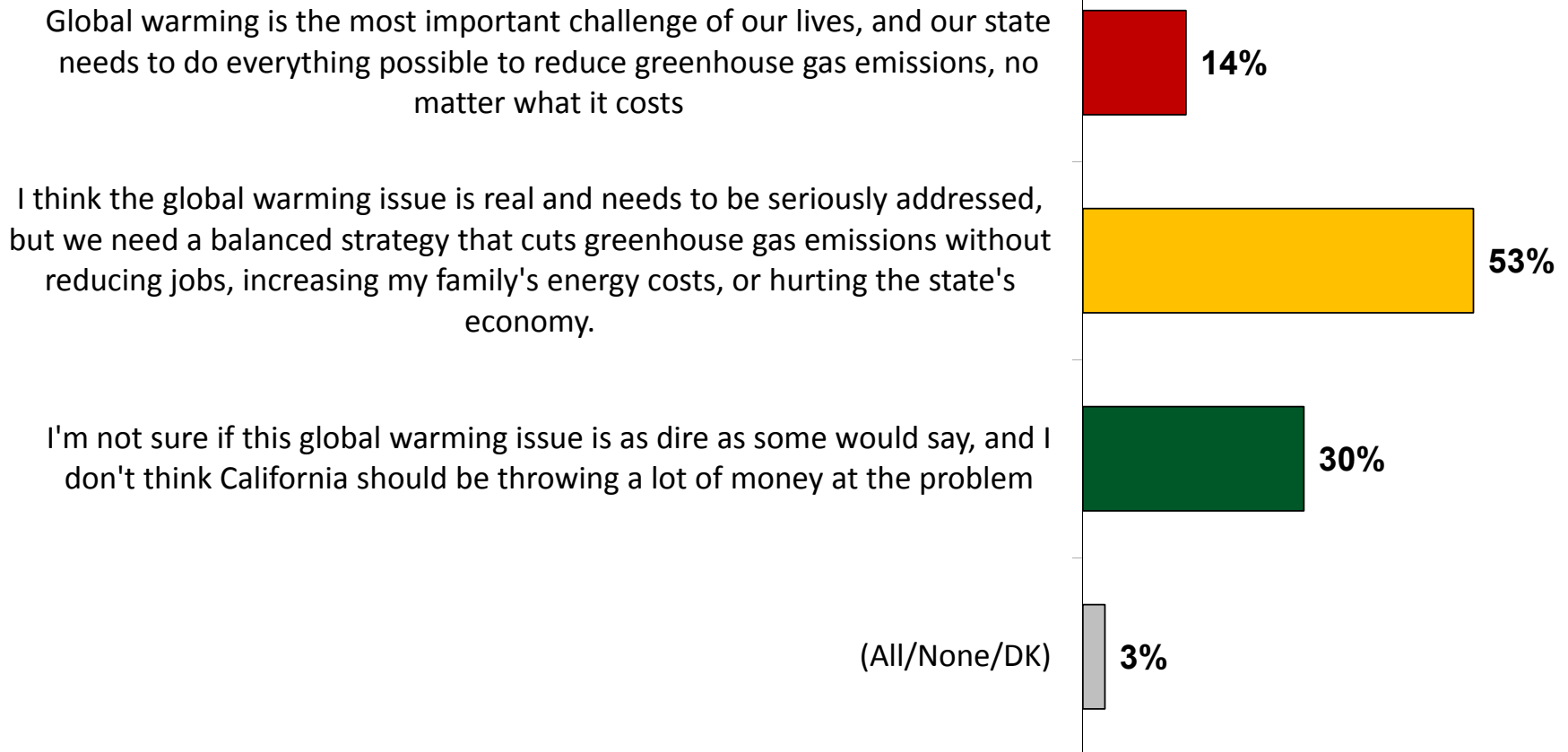
Voters are worried about the state budget, unemployment and schools.

***What do you think is the most important problem facing California?
(OPEN ENDED)***

	2008	2009
State budget/Budget deficit	18	31
Unemployment	7	20
Schools/Education	9	12
Economy	12	9
State government/politicians not effective	3	5
Taxes too high	3	4
Illegal immigrants	9	4
Health care costs/reforms	2	2
Water shortage/Quality	2	2
The environment/Global warming	2	1
Affordable housing	2	1
Same-sex marriage	2	1
Housing foreclosures/Mortgage crisis	5	0
Gas prices	9	0

Voters favor a balanced approach to addressing global warming.

Which of the following three statements is closer to your opinion:



Voters want leaders to focus on jobs.

For each of the following statements please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the statement.

■ Strongly Agree

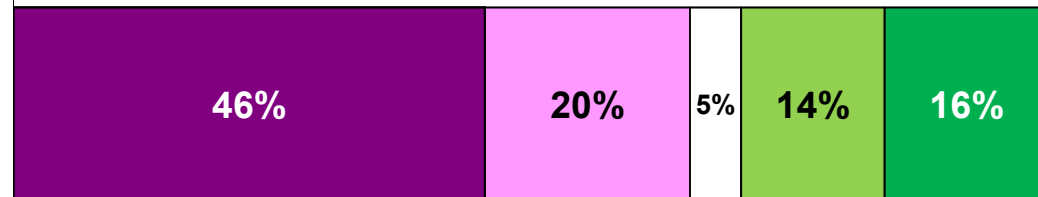
■ Somewhat Agree

□ Don't Know

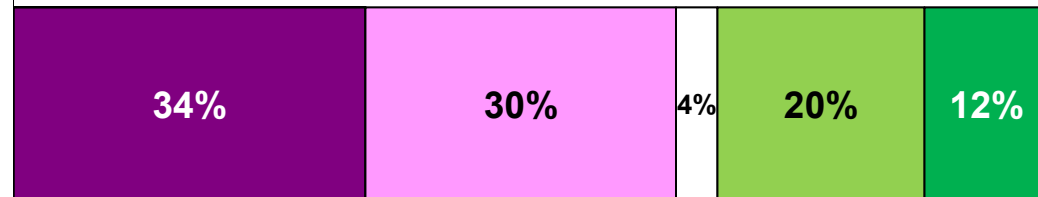
■ Somewhat Disagree

■ Strongly Disagree

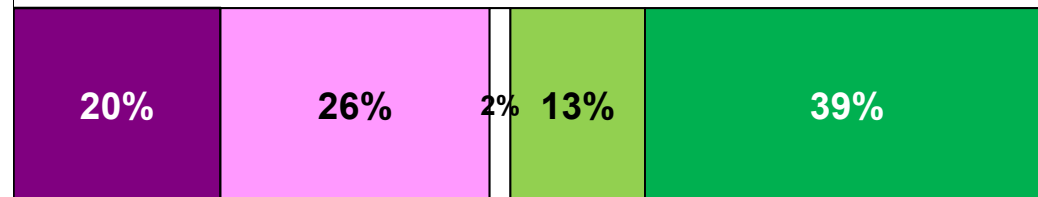
Q11 It doesn't make sense to have a CA-only global warming law because it's a world-wide challenge. One state alone can't meaningfully reduce global warming; the higher costs imposed by the law would hurt consumers, drive companies and jobs out of state.



Q12 In these difficult economic times, California's leaders should be focused on creating more high-wage, quality jobs here in the state and let the federal government work on addressing climate change.



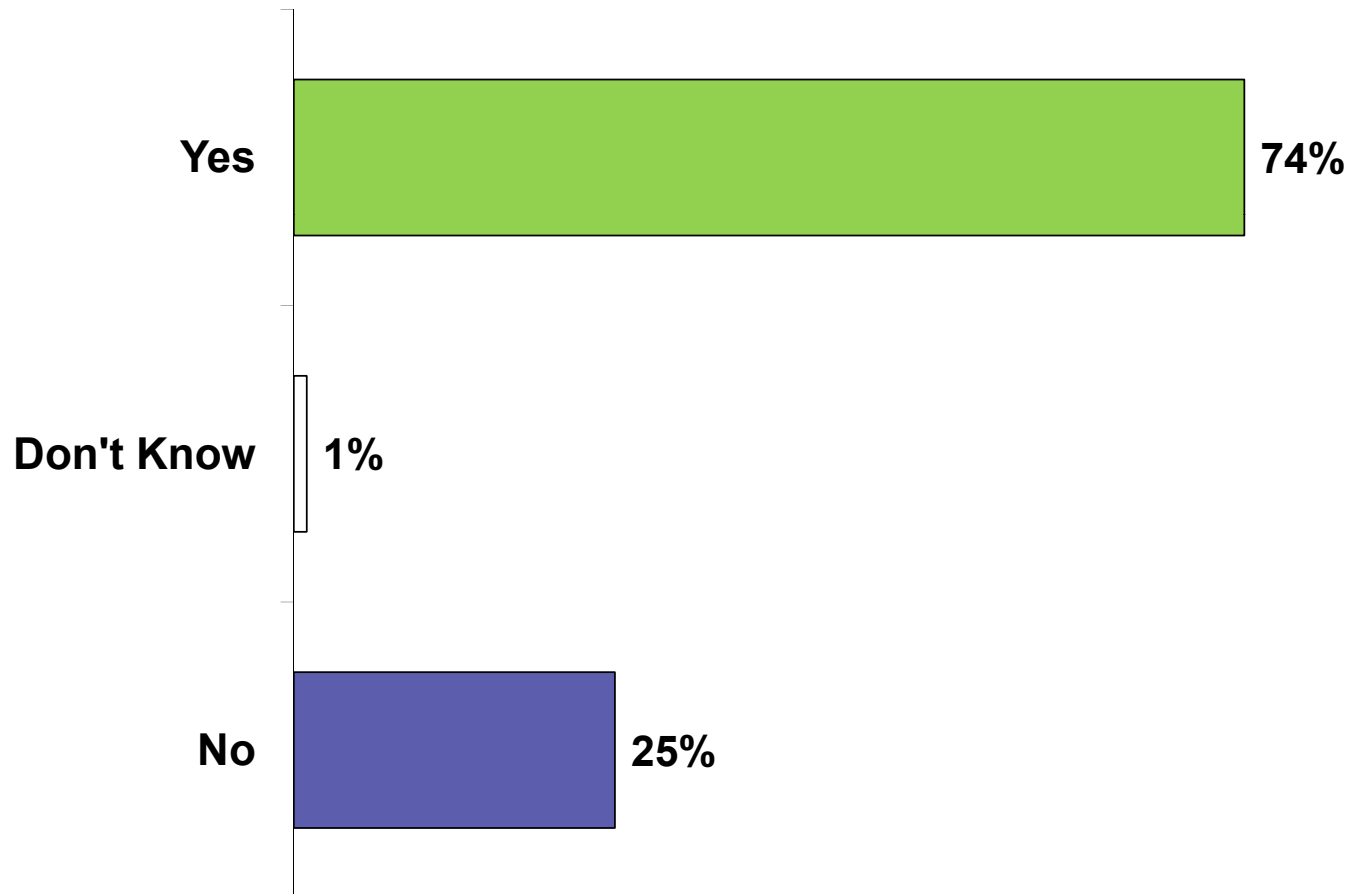
Q10 I am personally willing to pay more for gas, electricity, food, and other consumer goods to reduce global warming pollution.



Attitudes Toward AB 32

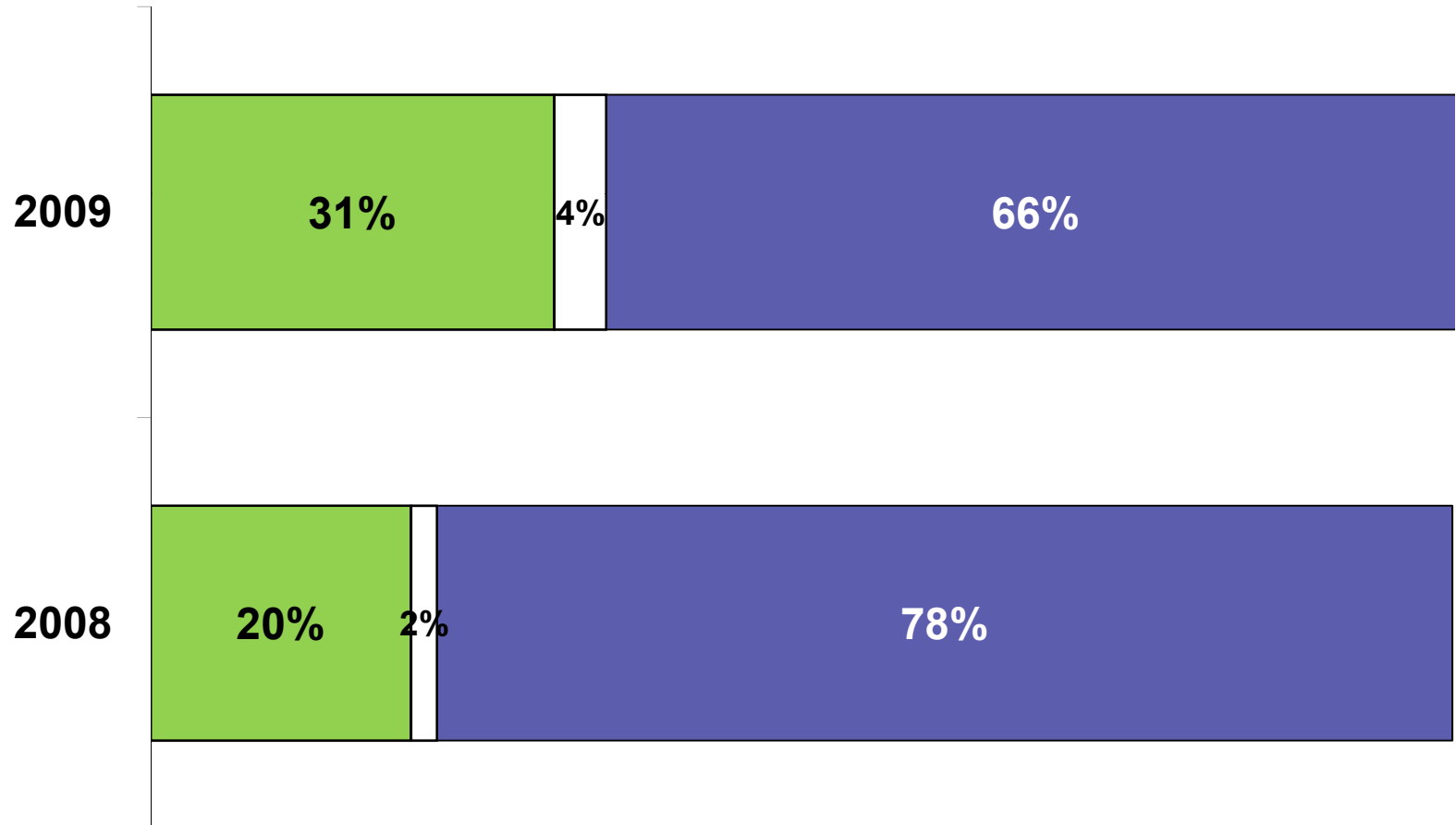
Most voters have heard about federal or international climate change actions.

Have you seen, read, or heard anything recently about federal or international actions related to global warming or climate change?



Awareness of AB 32 has increased but remains low.

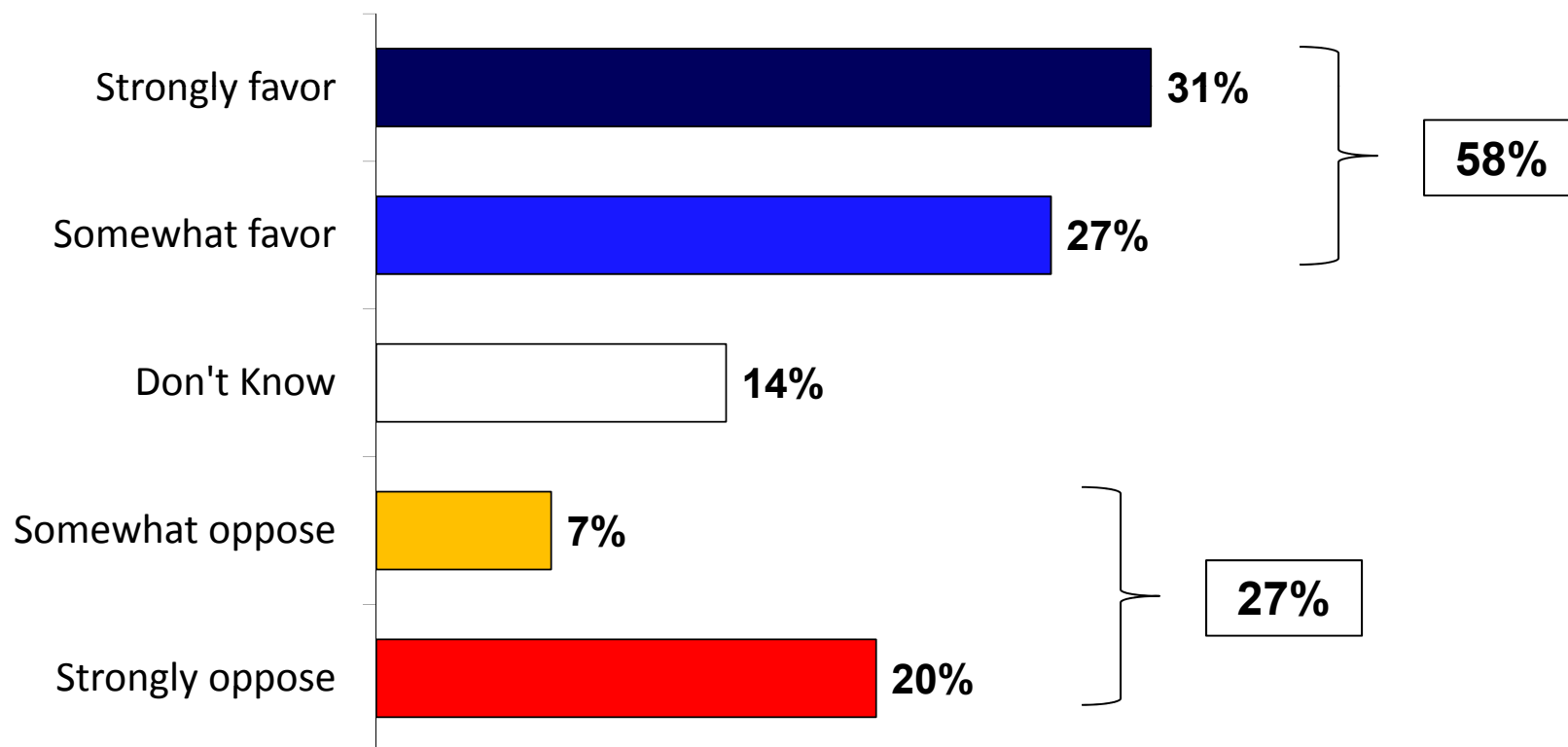
Have you seen, read, or heard anything recently about California Assembly Bill 32, known as the Global Warming Solutions Act?



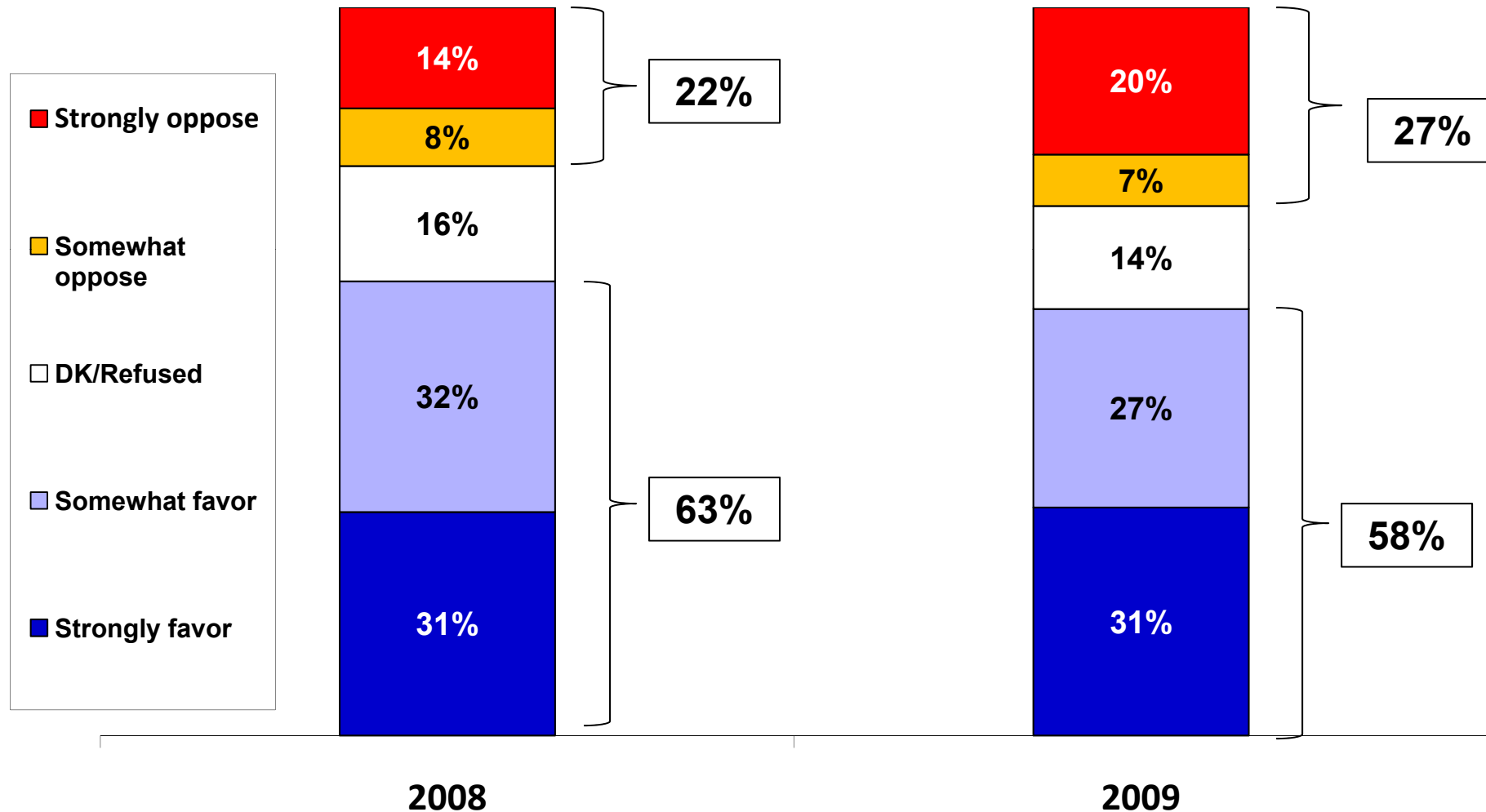
A majority of voters initially support AB 32.

In 2006, California enacted Assembly Bill 32, known as the Global Warming Solutions Act, which requires California to reduce its greenhouse gas emissions by 30 percent by the year 2020.

Based what you know today, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose the state's plan to achieve its goals established under the Global Warming Solutions Act?

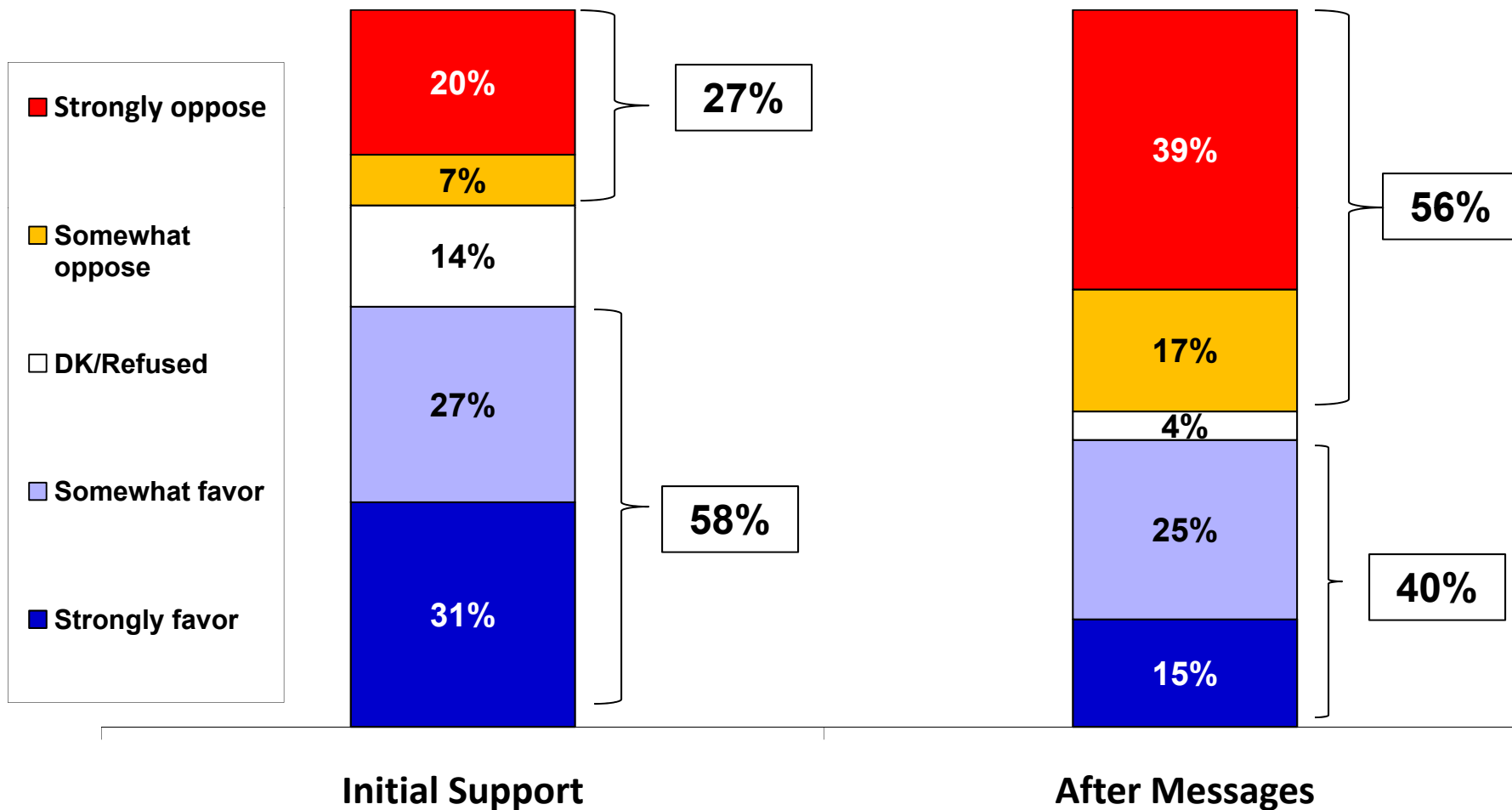


Initial support for AB 32 has declined over past 18 months



After voters hear messages for and against AB 32, support drops sharply.

Based on everything you've heard so far, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose the state's plan to implement Assembly Bill 32, the Global Warming Solutions Act?

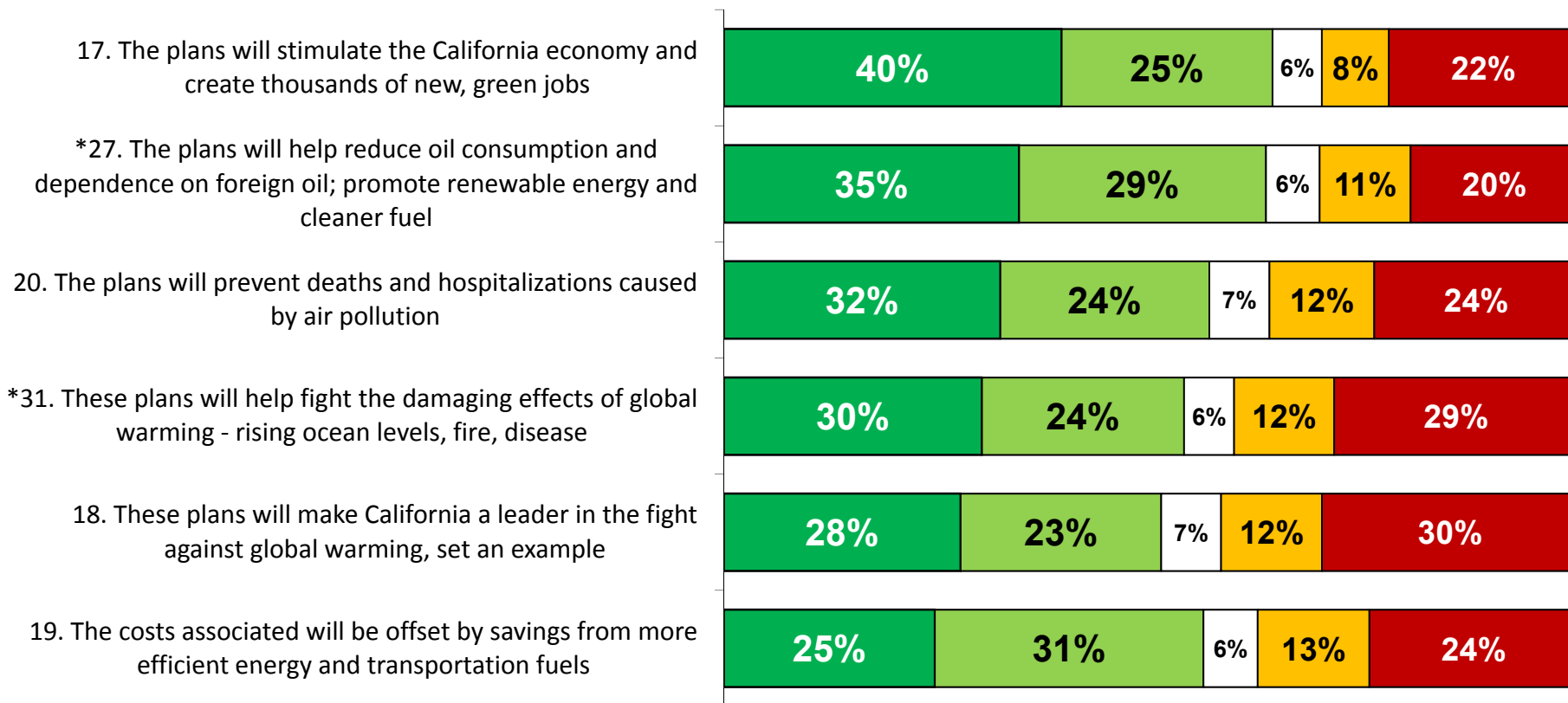


Impact of Messages about AB 32

Statements in favor of current implementation plans .

Please tell me if each of the following statements makes you more likely or less likely to support the current plans for implementing AB 32.

■ Much more likely to support
 ■ Somewhat more likely
 □ No diff./ DK
 ■ Somewhat less likely
 ■ Much less likely to support



**Denotes split sampled question*

Opposition messages emphasizing potential job losses and costs to consumers are most effective.

Please tell me if each of the following statements makes you more likely or less likely to support the current plans for implementing AB 32.

■ Much more likely to support ■ Somewhat more likely □ No diff./ DK ■ Somewhat less likely ■ Much less likely to support

*33. A study shows CA's global warming law would cost average small businesses \$50,000 each per year and cost nearly one million jobs



26. Law will reduce economic activity in CA, reduce government revenue; state will have to cut services or raise taxes



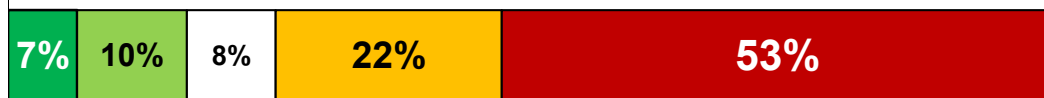
*34. The CARB claims it has the right to impose tens of billions of taxes on California companies with no 2/3 vote of the Legislature



21. The plans would greatly increase costs for everything Californians need - gas, electricity, housing, food



24. Auction tax alone would impose new costs of \$143 billion to California businesses, which equates to 53 cents per gallon of gas



22. Many jobs already lost; regulations and costs of law will force companies to leave California, taking more jobs with them

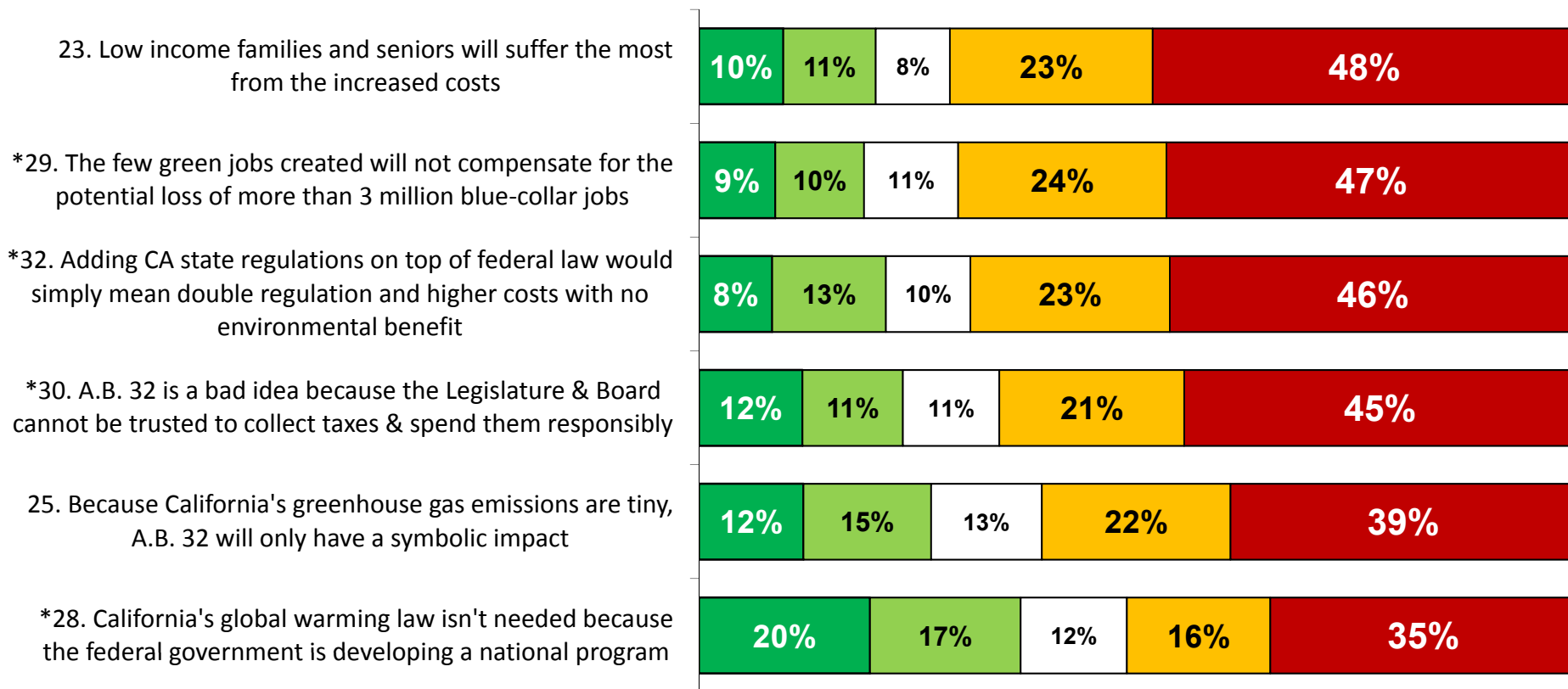


*Denotes split sampled question

Voters concerned about California-only approach.

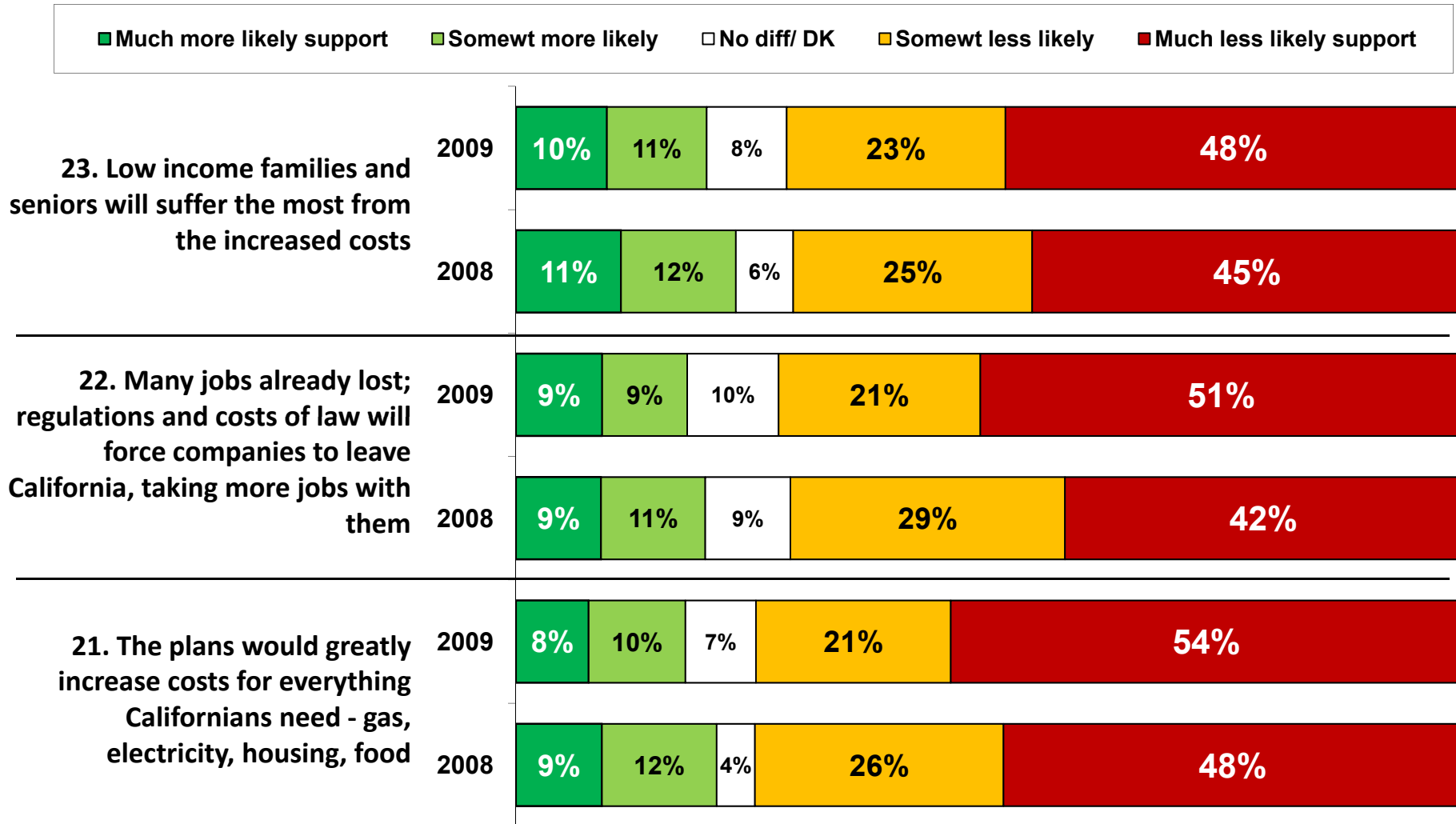
Please tell me if each of the following statements makes you more likely or less likely to support the current plans for implementing AB 32.

■ Much more likely to support ■ Somewhat more likely □ No diff./ DK ■ Somewhat less likely ■ Much less likely to support



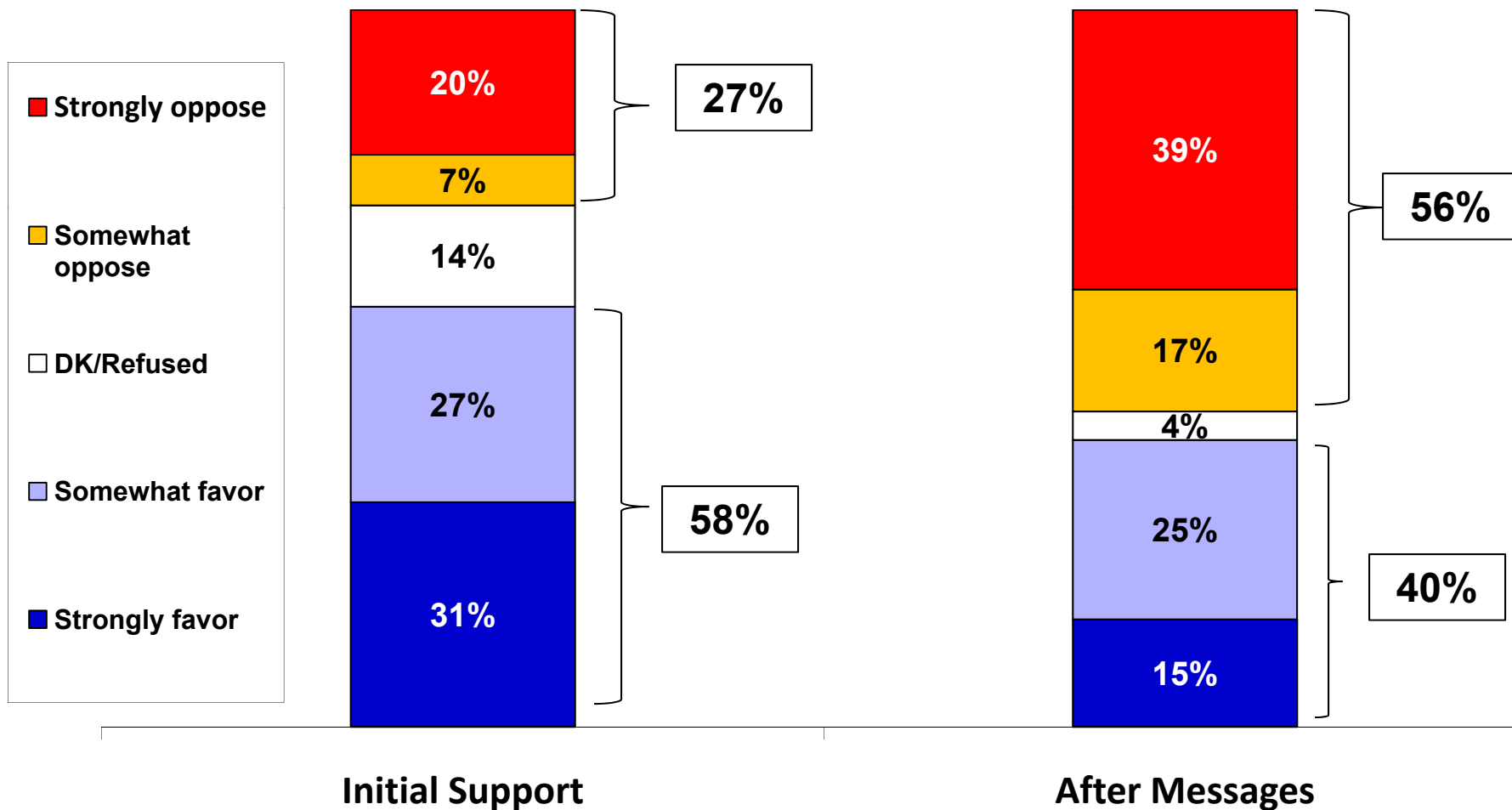
*Denotes split sampled question

Messages about jobs and consumer costs.



After voters hear messages for and against AB 32, support drops sharply.

Based on everything you've heard so far, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose the state's plan to implement Assembly Bill 32, the Global Warming Solutions Act?

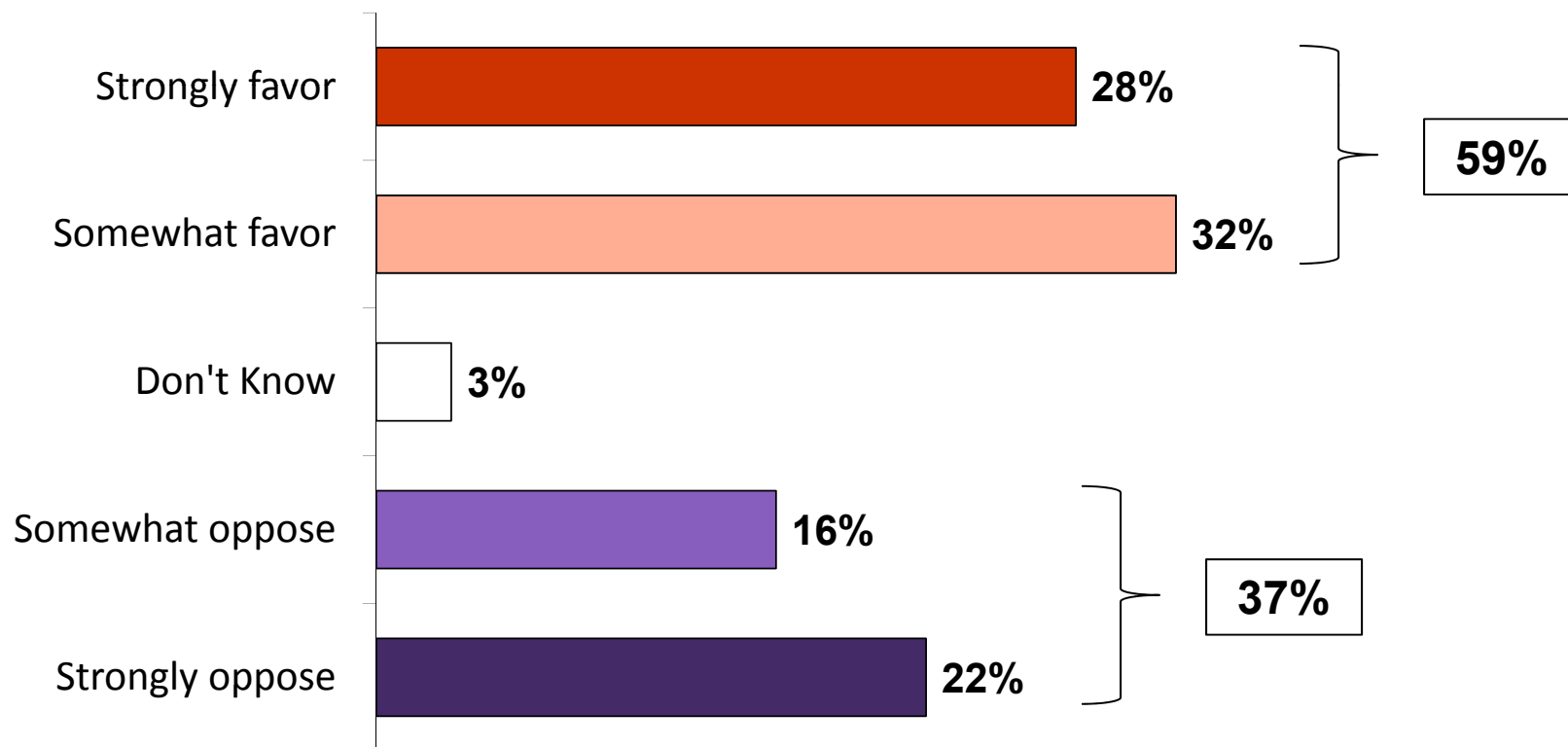


Attitudes Toward Low Carbon Fuel Standard

Nearly 6 in 10 voters support the low carbon fuel standard.

One component of the state's global warming law, called the low carbon fuel standard, would require a 10 percent reduction in the carbon intensity of transportation fuels by 2020.

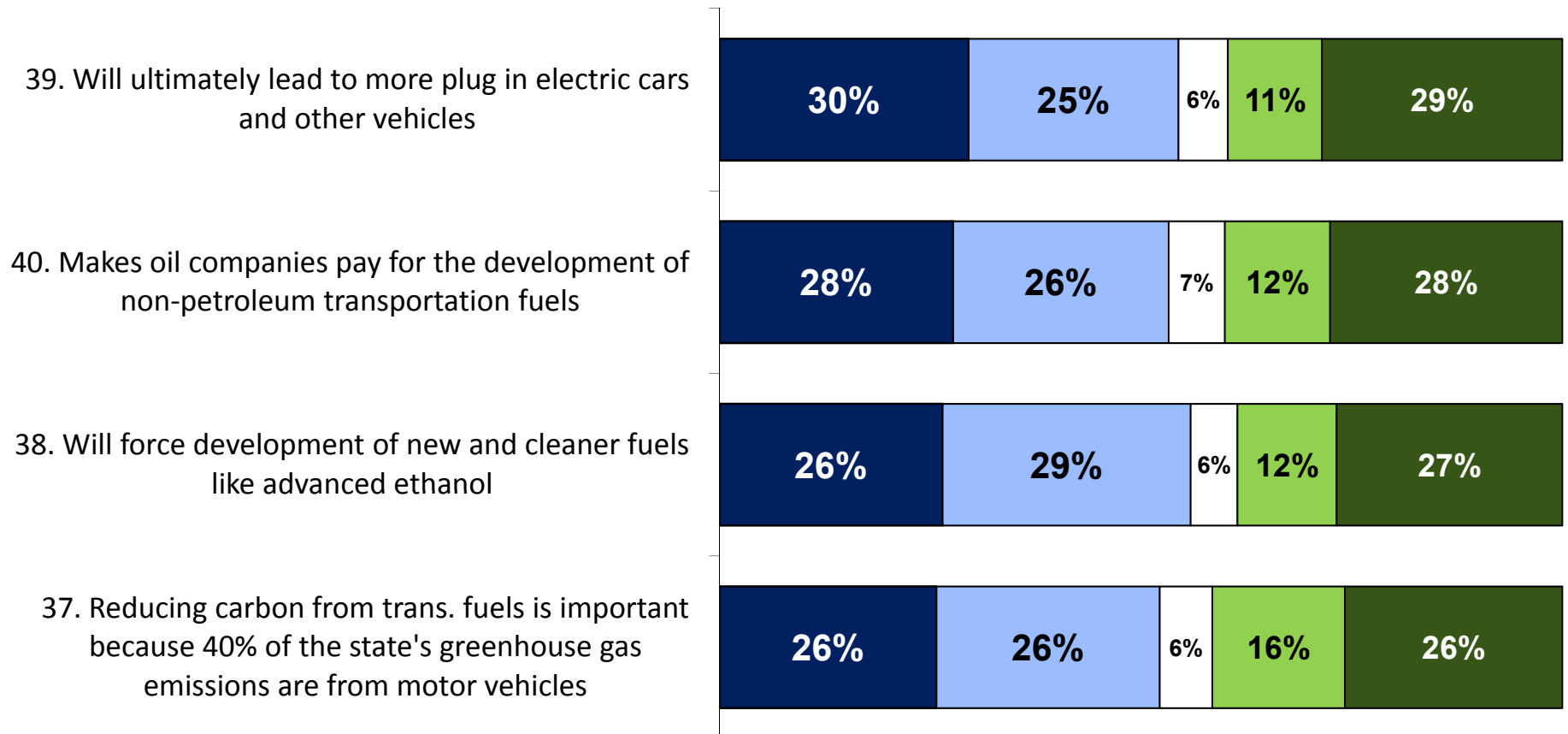
Would you say that you strongly favor, somewhat favor, somewhat oppose, or strongly oppose this proposed requirement?



Statements in favor of the low carbon fuel standard are somewhat persuasive.

Please tell me if each of the following statements makes you more likely or less likely to support the low carbon fuel standard.

■ Much more likely to support ■ Somewhat more likely □ No diff./ DK ■ Somewhat less likely ■ Much less likely to support



Opposition messages focusing on costs to consumers are most effective.

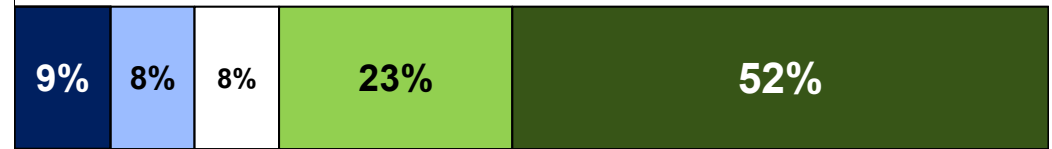
Please tell me if each of the following statements makes you more likely or less likely to support the low carbon fuel standard.

■ Much more likely to support ■ Somewhat more likely ■ No diff./ DK ■ Somewhat less likely ■ Much less likely to support

44. By forcing farmers to convert their crops to fuel would increase the price of food in the US and worldwide



42. Could mean that California might not have enough fuel to supply drivers in the state; could lead to rationing



47. Increasing fuel costs by nearly \$4 billion would force consumers to pay even more money for gasoline and result in job loss



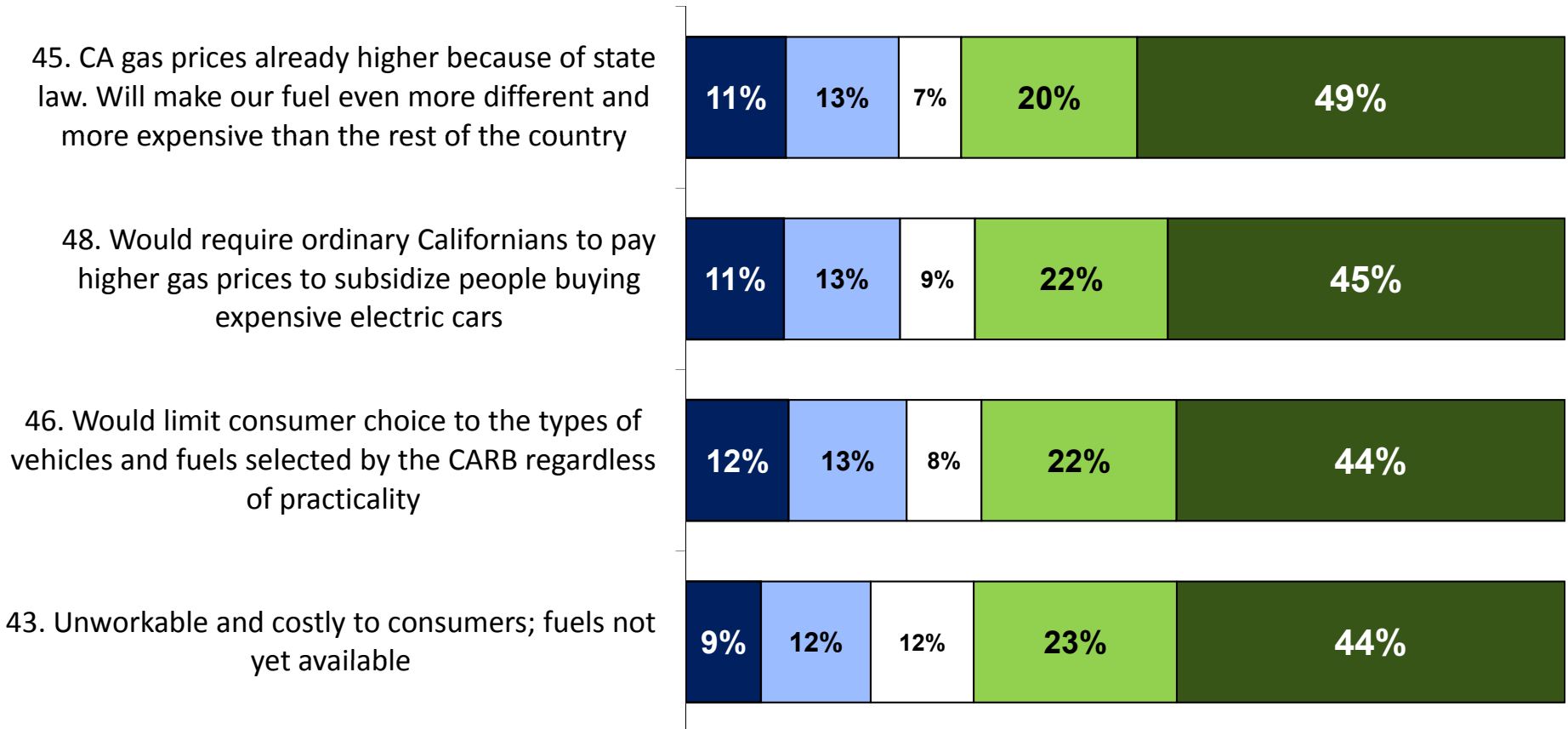
41. Will lead to far higher gasoline and diesel prices at the pump; one study says costs will increase by \$4 billion per year



Messages about fuel availability and CARB.

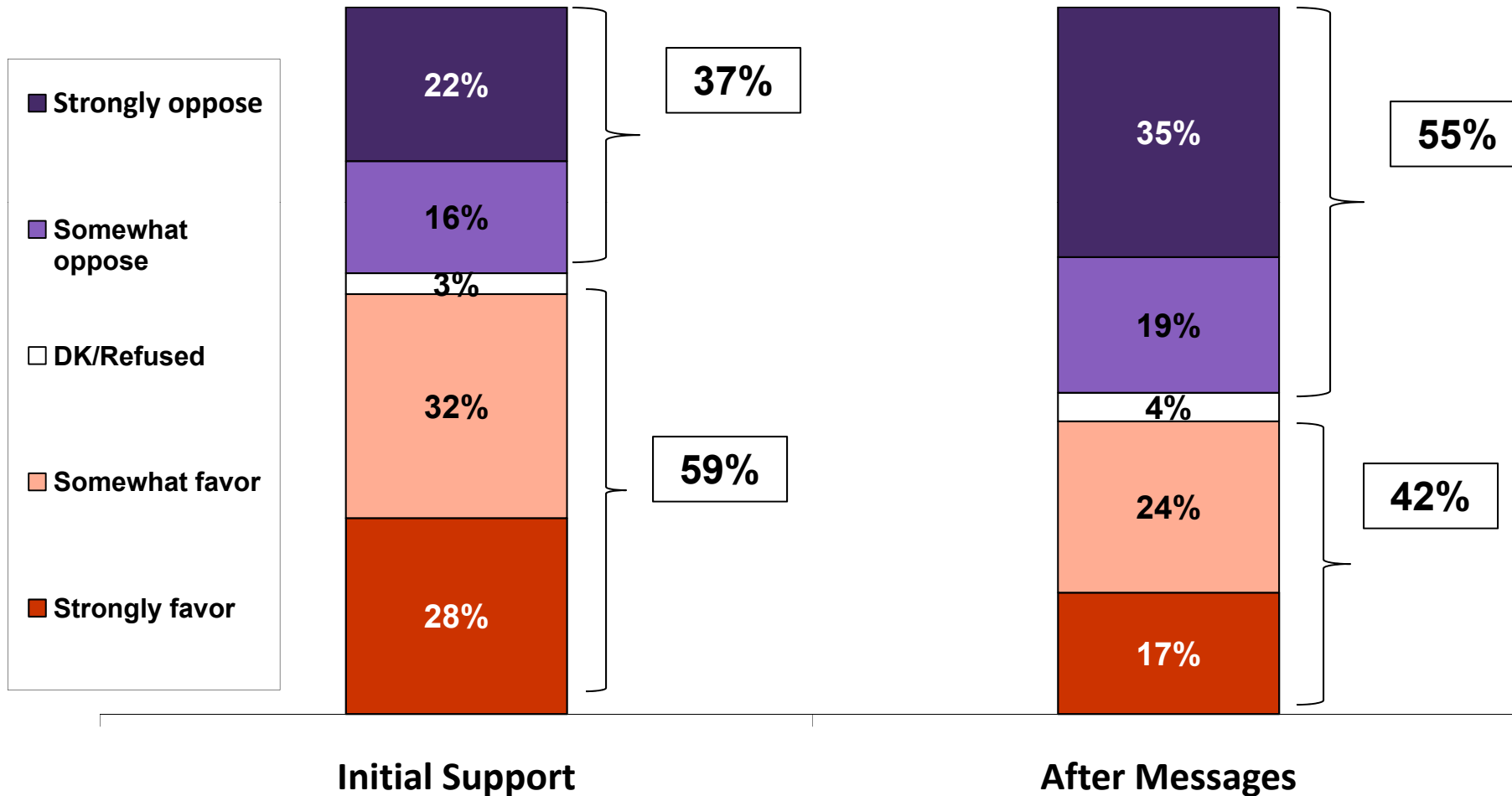
Please tell me if each of the following statements makes you more likely or less likely to support the low carbon fuel standard.

■ Much more likely to support ■ Somewhat more likely □ No diff./ DK ■ Somewhat less likely ■ Much less likely to support



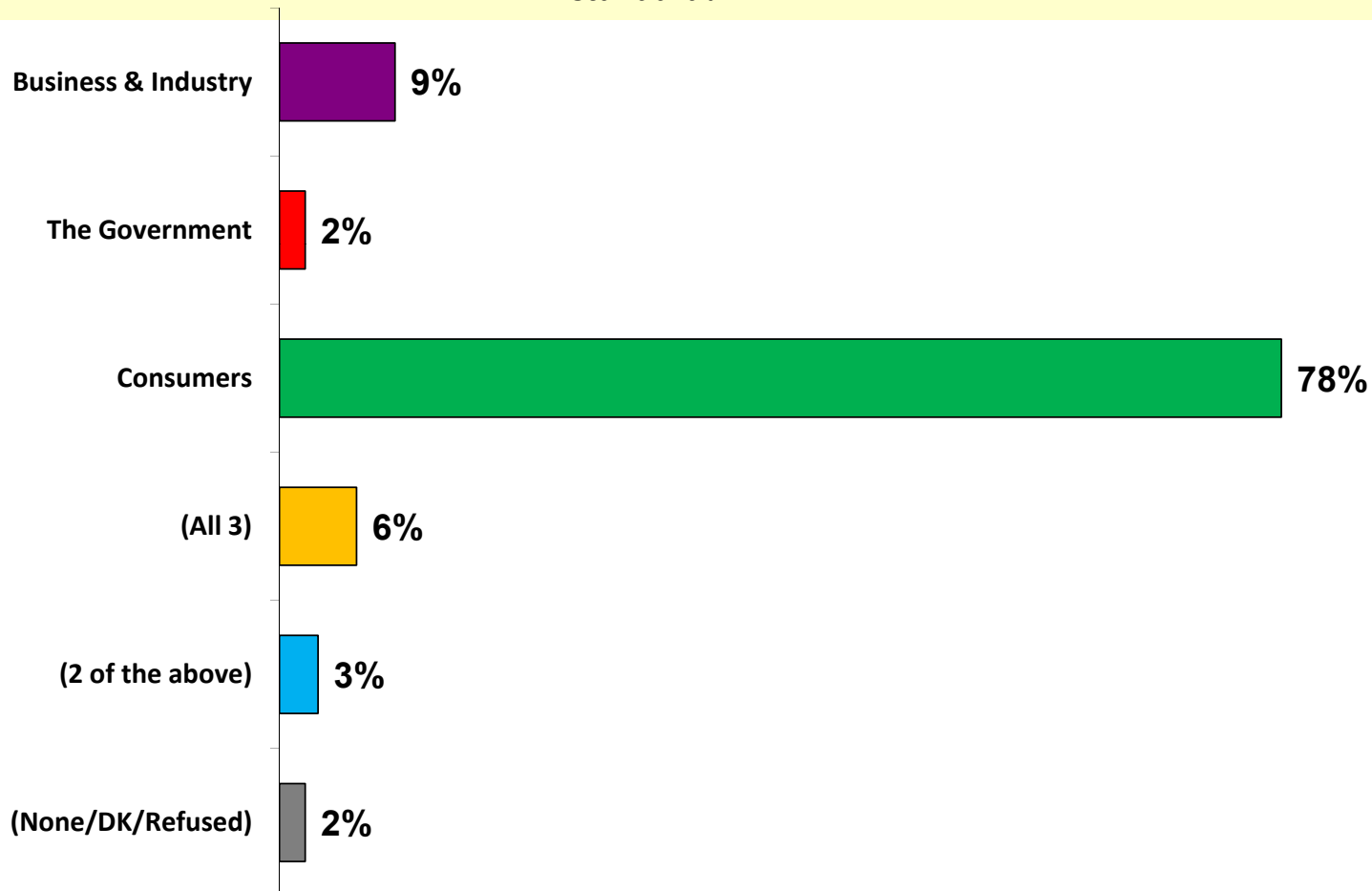
After voters hear messages for and against the low carbon fuel standard, a majority are opposed.

Based on everything you've heard so far, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose the proposed low carbon fuel standard, which would require a 10 percent reduction in the carbon intensity of transportation fuels by 2020?



The vast majority of voters believe consumers will be responsible for the costs of implementing the low carbon fuel standard.

Who do you think is likely to actually end up paying the majority of the costs for implementing the low carbon fuel standard?



Key Findings

- Voters are extremely pessimistic about the direction of the state and greatly concerned about jobs, the economy and the state budget.
- Most have heard about federal or international action relating to climate change. Awareness of AB 32 has increased but is still low.
- As seen in 2008 survey, a majority of voters initially support AB 32 and its general aims.
- However, after voters hear messages about the potential costs of implementing the law, support declines significantly.
- Messages about potential job losses and costs to consumers are the most compelling arguments against AB 32 implementation.
- Similarly, a majority of voters initially support the imposition of the low carbon fuel standard. After they hear messages about the economic impacts and costs to consumers, support falls to a minority.